

## Services Subject to Financial Needs Test

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The Rehabilitation Act Amendments allow State Vocational Rehabilitation Agencies to identify services requiring a consideration of financial need and to develop policies which identify services for which individuals may be required to participate in the cost of and extent of their services. As a matter of state policy, the Division of Service to the Blind and Visually Impaired (SBVI) considers a financial need test for certain services identified in this attachment.

The Division assures that a financial needs test is not applied and financial participation is not required for the following vocational rehabilitation services:

- ✓ Assessment for determining eligibility and priority for services;
- ✓ Assessment for determining vocational rehabilitation needs;
- ✓ Vocational rehabilitation counseling, guidance, and referral services;
- ✓ Placement services; and
- ✓ Assistive Technology services.

### Policy on Determining Financial Need

The Division has determined that the following services require a financial need test prior to service provision. All consumers shall be subject to a financial need test before delivering the following services:

1. Physical and mental restoration services;
2. Transportation services, except when determining the person's eligibility for vocational rehabilitation services and the nature and extent of the services;
3. Occupational and business license services;
4. Customary occupational tools, equipment and initial stock, including supplies for vending stands;
5. Assistive Technology Devices – excluding computers and computer related devices needed to overcome a disability related impediment to employment;
6. Maintenance services for any purpose except when determining the person's eligibility for vocational rehabilitation services and the nature and extent of the services necessary;
7. Training books and materials; and
8. Tuition and Fees for participating in post secondary academic training programs that are under a "Federal Student Financial Assistance Program".

### Implementation and effective date on Tuition and Fees for participating in post secondary academic training programs that are under a "Federal Student Financial Assistance Program".

All eligible consumers who have an approved vocational plan (IPE) signed by a senior rehabilitation counselor or district supervisor that includes a plan for post secondary academic training on or before September 30th, 1999 will be considered under the previous financial need policy of up to four years depending on the vocational goal, plan and usual time period for completion for the training program required to accomplish the goal. State Office exceptions can be made for extenuating circumstances related to a person's disability. For individuals placed in an approved plan (IPE) on or after October 1st, 1999 the NEW POLICY for financial need and post secondary education will be in effect. This of course means that tuition and fees will be considered a service requiring a financial needs test to

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determine financial participation by the vocational rehabilitation agency. This policy applies uniformly to all individuals in similar circumstances and to all individuals within each geographic region. This financial needs policy assures that the level of an individual's participation in the cost of vocational rehabilitation services is:

- (A) Reasonable;
- (B) Based on the individual's financial need, including consideration of any disability-related expenses paid by the individual; and
- (C) Not so high as to effectively deny the individual a necessary service.

The determination of financial need takes into consideration the following:

- ✓ The size of the family;
- ✓ Dollars available from income producing real property;
- ✓ Dollars available from cash, bonds, securities & investments;
- ✓ Annual income;
- ✓ Extenuating costs;
- ✓ Relationship to federal poverty levels; and
- ✓ Consumer financial participation;
- ✓ Criteria used by the secondary training program in meeting the federal student financial assistance program criteria.

The counselor must re-evaluate the financial need annually at a minimum or whenever the financial circumstance of the individual changes significantly. Significant changes include marriage or divorce, changes in dependent status, significant change in income or to the Individualized Plan for Employment (IPE).